# **Lesson 2 - The Investigation process**

In this lesson you'll use the Investigation Summary form to record:

- the reason for opening an investigation
- \* the animal owner id and location
- the premises id and location
- the person responsible for the investigation

You'll also use the Herd Exam form to record:

the identity of the diagnostician examining the herd, clinical history, clinical signs, lesions seen, diagnostician's clinical diagnosis and certainty of a foreign or emerging disease.

You'll also use the Specimen Submission form to record:

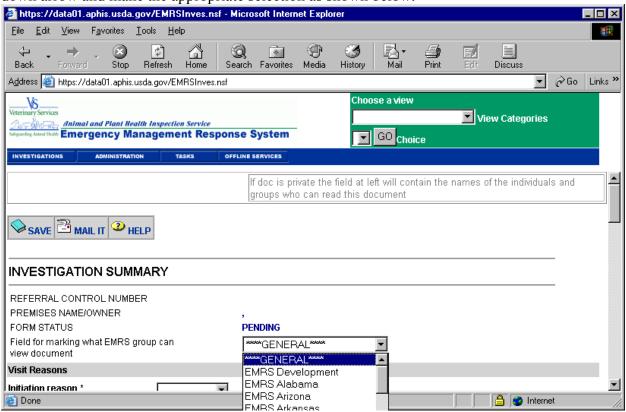
the submitter, animal owner, method shipped, lab sent to, reason for submission, animal numbers and other summary information

You'll also use the Sample Detail form to record:

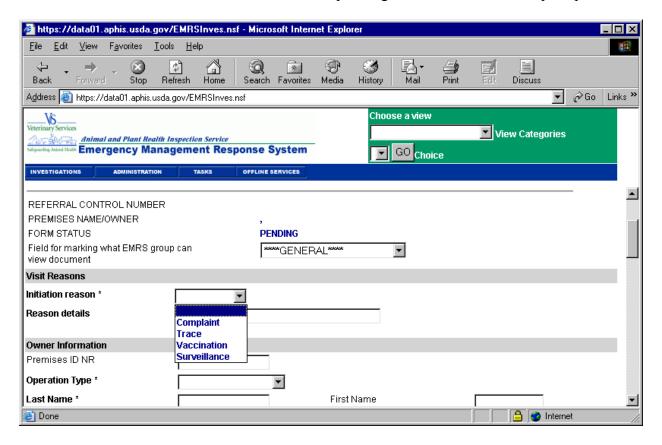
• whether individual or groups of samples are submitted, the sample id number and type

The People involved in the work of investigating premises, appraising, removing animals and materials, and cleaning up (investigators, field personel and support staff) are the primary users of the Investigation module. The Investigation Summary form is used to open all new investigations and initiate all response actions. It's helpful to think of the Investigation Summary form as the *Parent* form. All other forms accessed from the Investigation Summary (such as the Herd Exam form) are *Child* or *Grandchildren* forms.

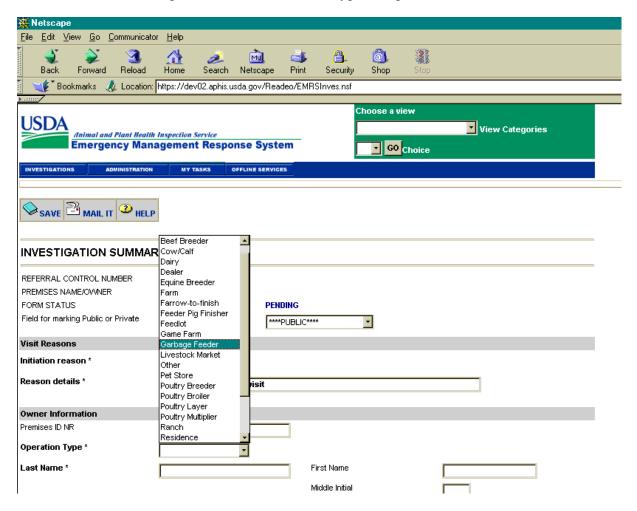
When the Investigation Summary Form is first accessed, the form will have a *PENDING* status. The field for marking the investigation as public or private has a drop down box. Click on the down arrow and make the appropriate selection as shown below.



Select the appropriate initiation reason from the drop down box. Options are **complaint**, **trace**, **vaccination** or **surveillance**. Enter details corresponding to the initiation in the space provided.



The Premises ID is a local Generic Data Base, state, or national number used to identify the premises. Data entry is optional, but the id is important in linking this investigation to other information. Use the drop down box to select the Type of Operation as shown below.



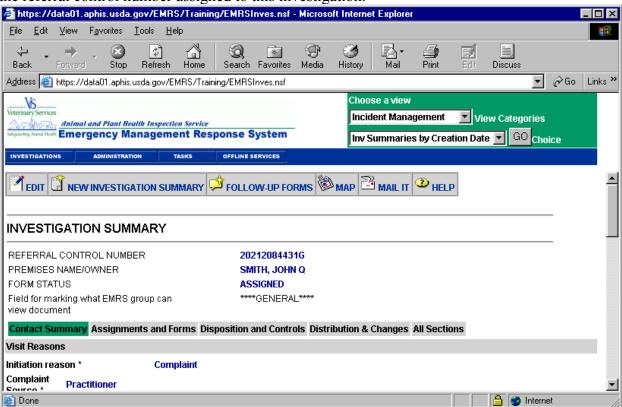
# Step 4

Continue to enter information about the premises. Data entry is required in fields with names appearing in bold type. After entering the State Code, click on the icon shown below to access a list of the state's counties.



Continue

After completing data entry, press the **SAVE button**. A Contact Summary will display showing the referral control number assigned to this investigation.

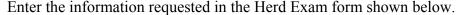


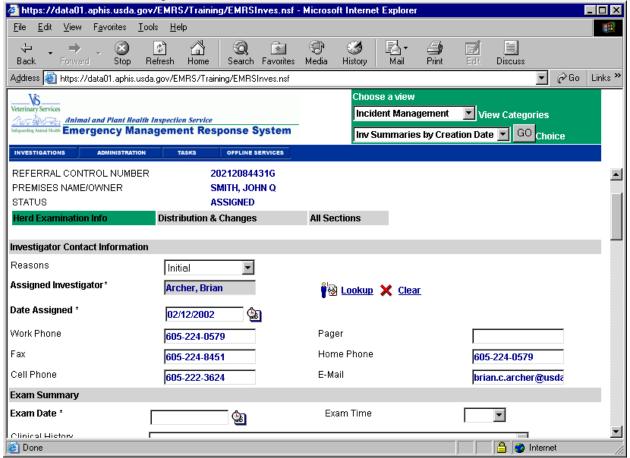
# Step 6

Click on the **Follow-up Forms** button to access a list of "child" forms linked to the Investigation Summary. The forms will be listed in the most probable order of use. Select the **Herd Exam** form.

The Herd Exam form records the identity of the diagnostician examining the herd. It also documents clinical history, clinical signs and lesions seen. The diagnostician's clinical diagnosis and certainty of a foreign or emerging disease are also recorded.

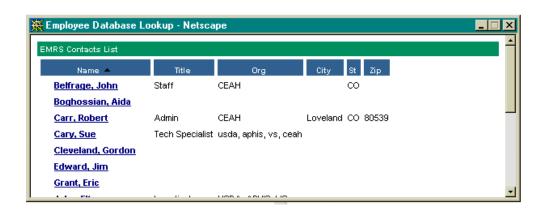






# Step 8

Click on the Lookup icon next to the Assigned Investigator field to access a list of EMRS contacts as shown below.

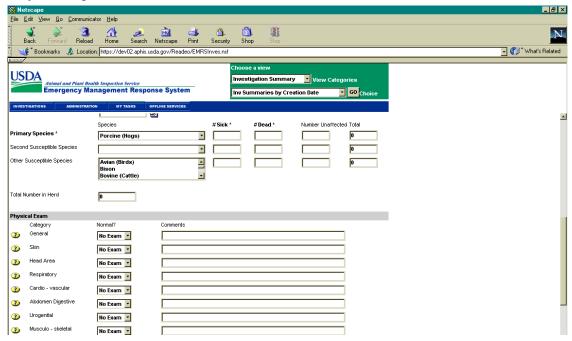


Click on the clock icon next to any date field to access a calendar as shown below. After clicking on the appropriate date, the date will automatically be entered in the field.

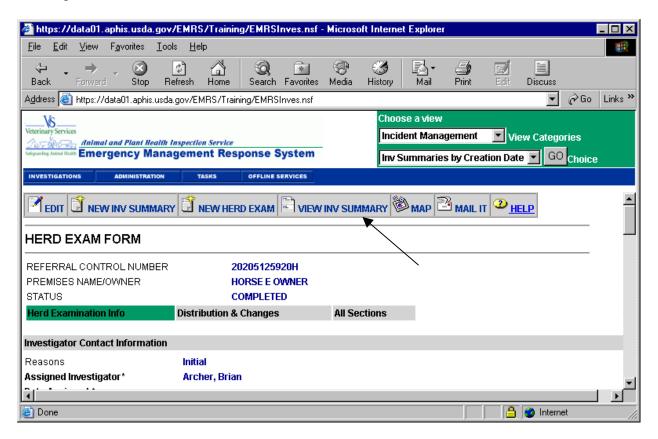


# Step 10

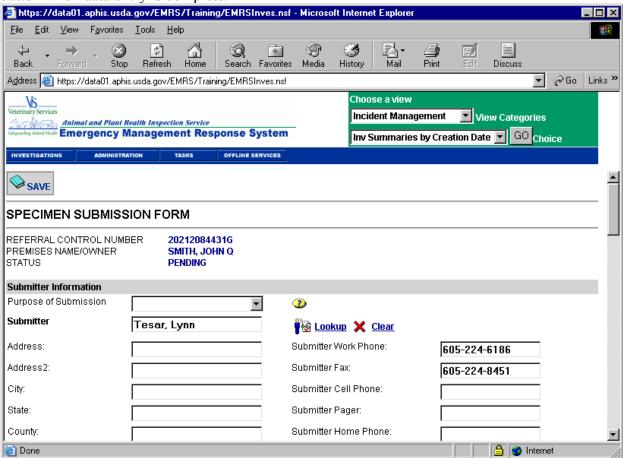
You will have to scroll down to access all sections of the Herd Exam form. When entering information in the Physical or Necropsy Exam sections, click on the Question Mark icon to receive an explanation of the type of information requested. Press the **SAVE** button when data entry is complete.



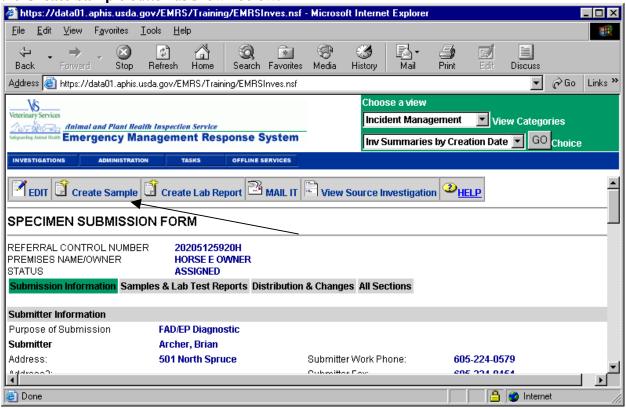
Click on the **View Inv Summary** button to return to the "parent" Investigation Summary document. Click on the **Followup Forms** button. Select the Specimen Submission Form from the list provided.



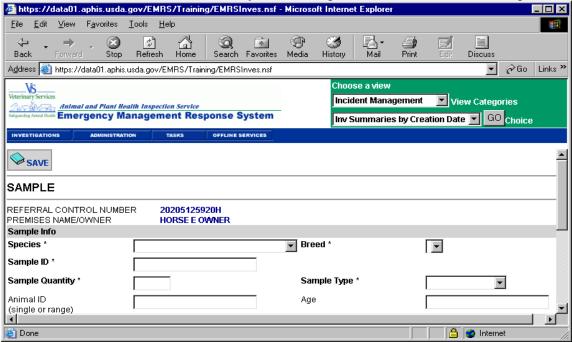
Enter information requested in the Specimen Submission form shown below. Press the **SAVE** button when data entry is complete.



When a summary of the information entered in the Specimen Submission form appears, click on the **Create Sample** button as shown below.

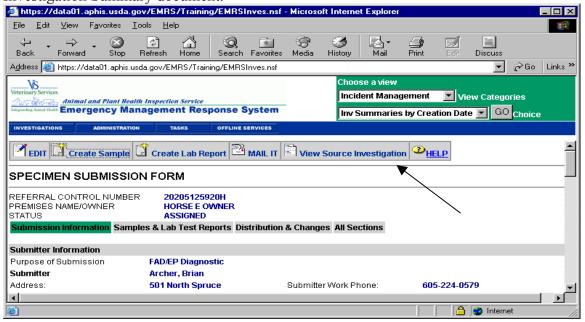


Press the **SAVE** button when data entry in the Sample form shown below is complete.



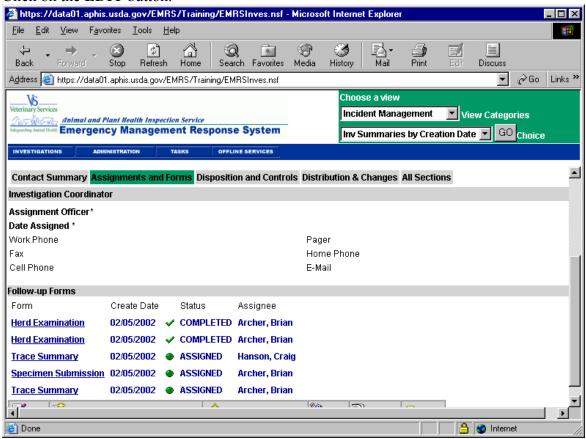
## Step 15

Click on the **View Source Investigation** button to return to the "child" Specimen Submission document. Click on the **View Source Investigation** button to return to the "parent" Investigation Summary document.



Click on the **Assignments and Forms** tab to access Assignments and Forms Investigation Summary shown below.

Click on the **EDIT** button.



Click on the Lookup icon next to the Assignment Officer field of the Investigation Coordinator section to access a list of EMRS contacts. The investigation coordinator must be an Area Veterinarian in Charge, a READEO Section Head or a Disease Reporting Officer. Press the **SAVE** button when data entry is complete.

